Records

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Frequent Questions about Cleanup Days and Records

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What is a cleanup day?

A cleanup day is a day that an office sets aside to allow staff to clean up their workspaces and common spaces. You can use this day to discard broken furniture, recycle materials such as old telephone books and empty binders, and return library materials. You should also use this time to review your records and make sure they are captured in your recordkeeping system.

How does a cleanup day benefit me?

Cleanup days free up valuable office space and equipment. In addition, if you ensure that your records are in proper order, you will be complying with Federal and Agency requirements. It is imperative that records can be located efficiently when they are requested.

What do I do on a cleanup day?

On a cleanup day, each staff member will face the task of deciding which of their records should be retained, which should be retired, and which should be recycled. Keep the following guidelines in mind when reviewing your office records:

- Retain only those records required to conduct current Agency business.
- Retire all inactive records that are eligible as indicated in the applicable records schedule.
- Recycle all records that have exceeded their retention period as indicated in the applicable records schedule.
- Recycle any personal papers, technical reference materials, and other non-records items that are no longer needed.

How do I determine what to do with my records?

The basic file maintenance activities are:

- Closing records - close or break records as instructed in the records schedules;

- Starting records - start new folders for new projects; and
- Retiring records - retire your records to areas designated for inactive storage.

What do I do with my e-mail?

File e-mail messages that qualify as records into your recordkeeping system. Messages can be saved in the Enterprise Content Management System (ECMS) or printed and filed in a paper recordkeeping system. If you print the message, be sure to include transmission data (the name of the sender and recipients, the date of the message) and any attachments. If the message is saved in ECMS, the transmission data and attachments will be captured automatically.

Examples of e-mail records include:

- Corrections to text, notes or revisions, when they document the deliberative process of the final version; drafts that modify grammar, punctuation, and formatting are not records
- Documentation of significant Agency decisions
- Development of a policy, procedure, or guidance
- Transaction of business with a state agency

For more information on e-mail records, see <u>Frequent Questions About E-Mail and Official Records</u>.

Where can I go for additional guidance?

If you have policy questions about a cleanup day, contact the <u>Records Help Desk</u>. You can find additional guidance in the following publications:

- <u>Frequent Questions About Personal Papers</u>
- <u>Frequent Questions About Working Files</u>
- <u>What is a Record?</u>
- What Every EPA Staffer Should Know About Records Management